



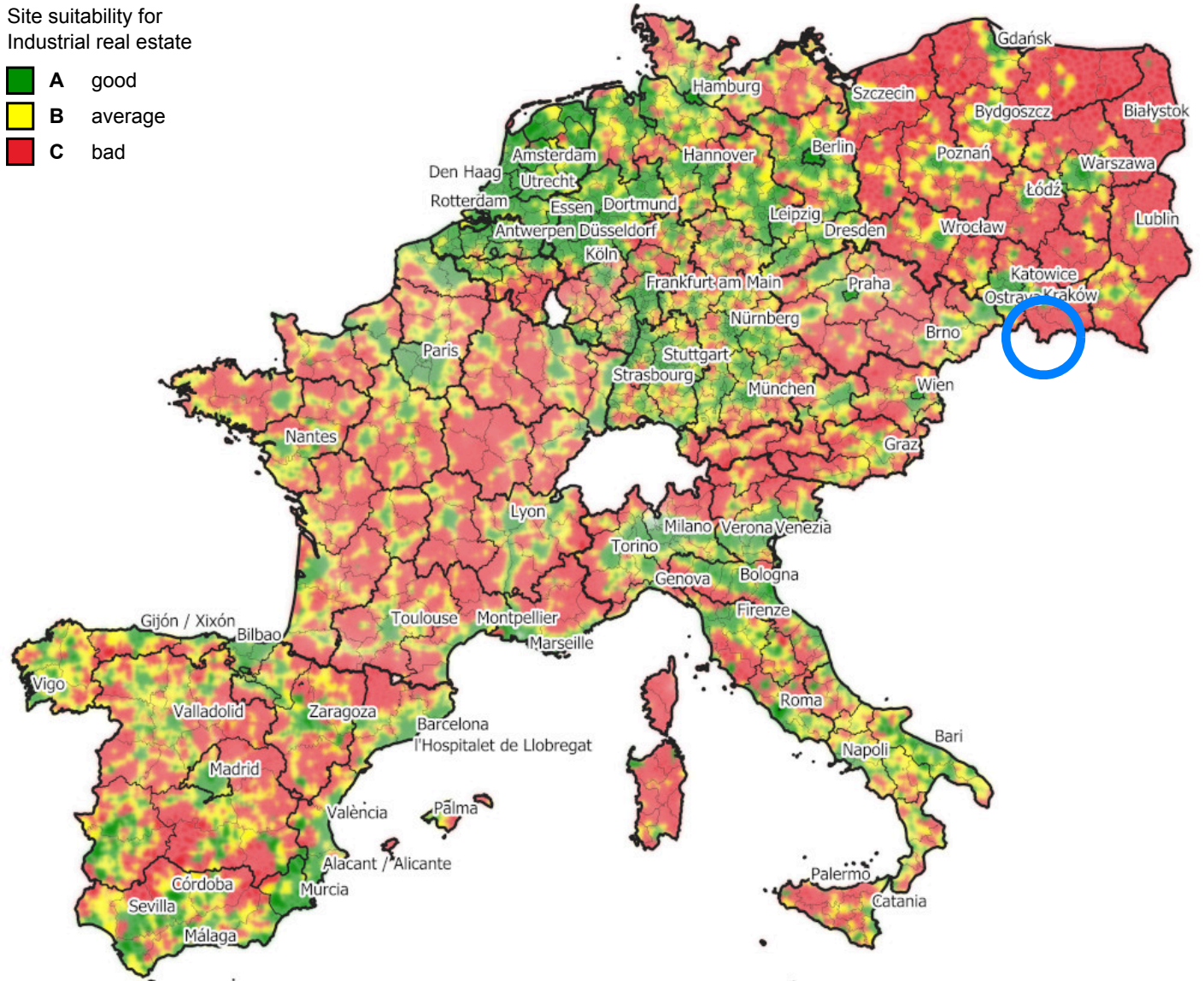
IndustrialBundle Zakopane - 2025 -

(Date: 31. Dec 2025)

Location in relevant EU Countries

Site suitability for
Industrial real estate

- A good
- B average
- C bad

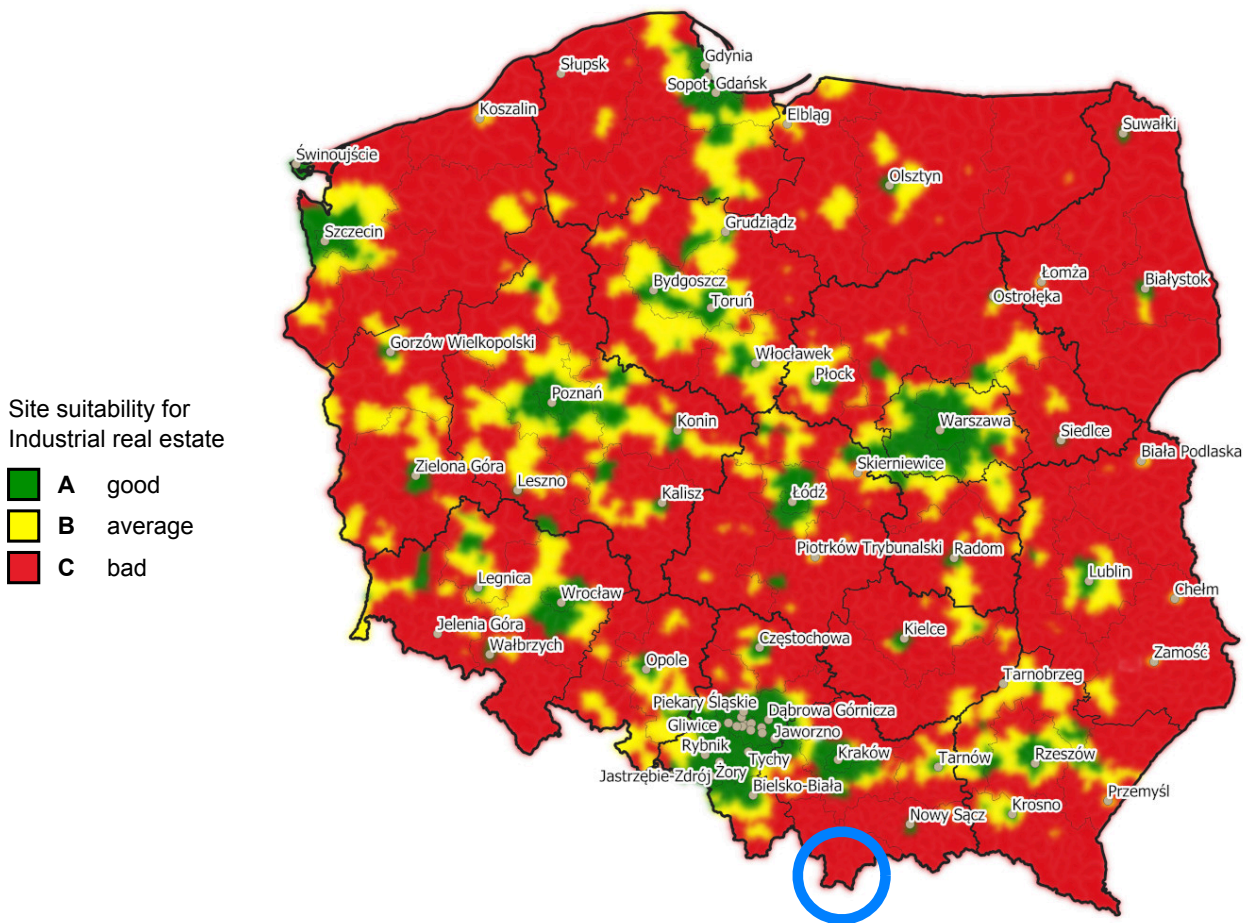


Map source: IndustrialPort
Date: 31. Dec 2025

IndustrialBundle EU



National Map



Source: IndustrialPort, © EuroGeographics for the administrative boundaries
 Date: 31. Dec 2025

Site suitability within Europe according to IndustrialScore for Zakopane: CC

This place is within the fourth quartile in the european comparison.



1 Regional industry and logistics real estate market

Zakopane is a town in southern Poland, located near the Slovak border at the foot of the Tatra Mountains. It is best known as a mountain resort and tourism center rather than an industrial hub. The local economy is strongly shaped by hospitality, retail, seasonal services, and outdoor recreation, with demand influenced by visitor flows throughout the year.

From an industrial and logistics perspective, Zakopane has limited suitability for large-scale facilities. The mountainous terrain, protected natural surroundings, and tourism-oriented land use constrain the availability of flat, developable plots and reduce the likelihood of extensive warehouse or manufacturing development. Transport access is primarily oriented toward regional road connections, with logistics activity generally focused on small-scale distribution, local supply, and service operations rather than heavy freight handling.

The area may support light commercial uses, storage linked to tourism and construction, and small service depots, but it is not typically associated with major industrial estates or large logistics parks. Overall, Zakopane is characterized by a service-based local economy and a spatial structure that favors tourism and residential uses over industrial development.



2 Statistical data

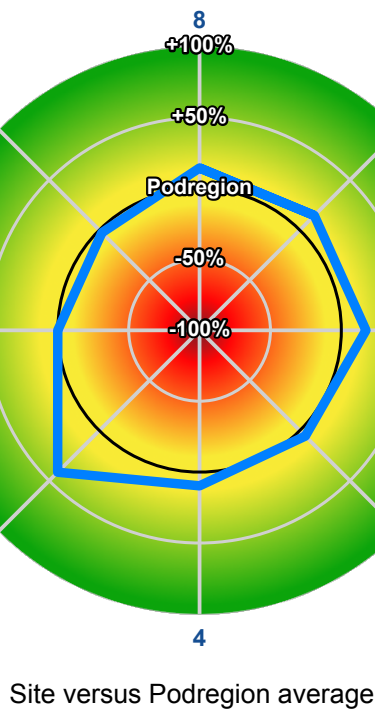
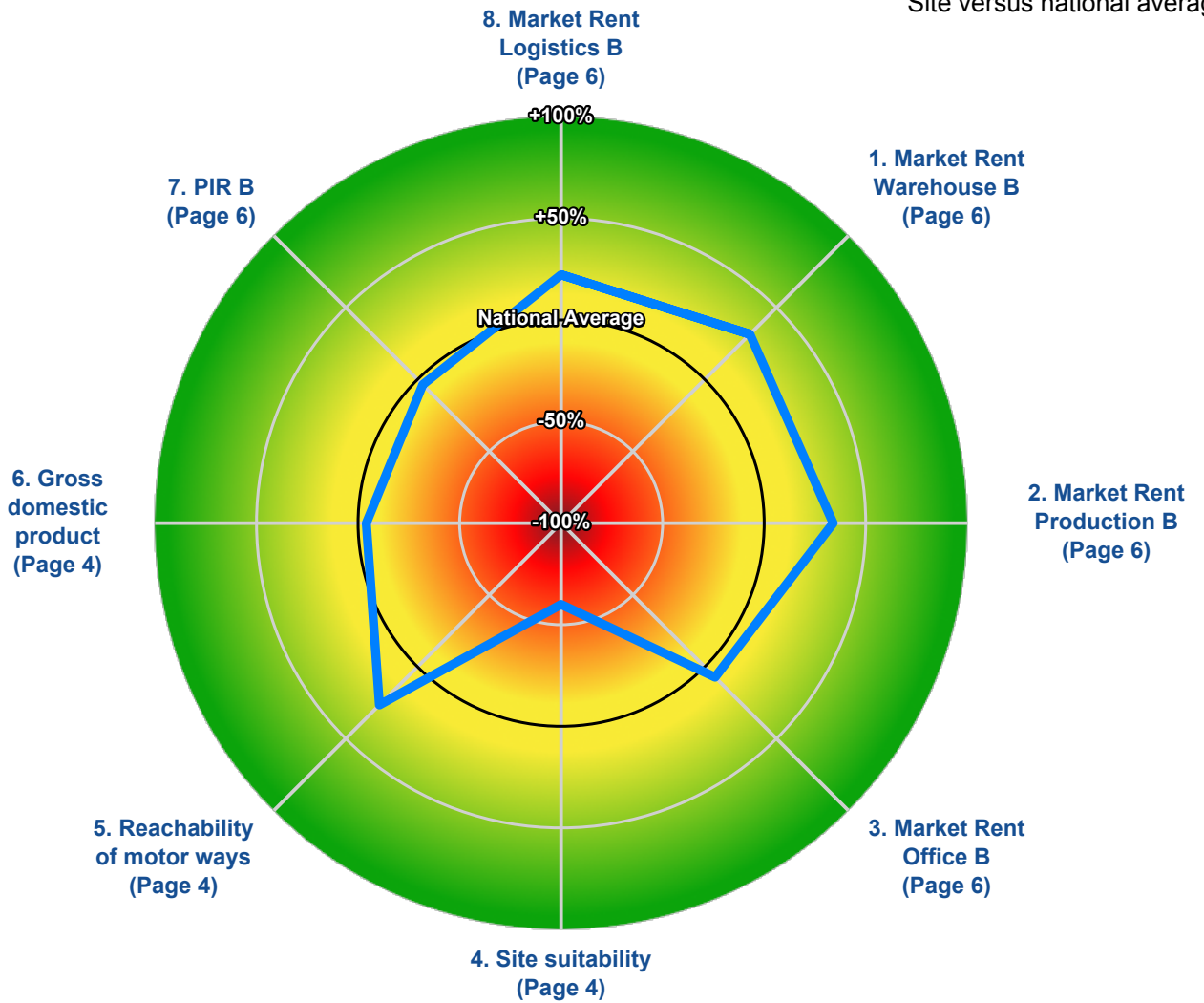
Podregion	Nowotarski	Association of local authorities	Zakopane
Population	27,191	Population density	323 citizens per km ²
IndustrialScore (EU)	CC (bad)		
Reachability	National Average	Zakopane	Diff. to national average
Motorways	31 Min.	23 Min.	-25.8 %
Expressways	26 Min.	26 Min.	0.0 %
Federal roads	20 Min.	7 Min.	-65.0 %
Statistical data	National Average	Nowotarski	Diff. to national average
Proportion of employed population to total population*	39.2 %	32.9 %	-16.1 %
Proportion of population aged 18-65 to total population*	65.7 %	65.5 %	-0.3 %
Gross domestic product per employed person*	24,014.50 €	23,037.90 €	-4.1 %

* NUTS3-Level (Podregion)



3 Site overview

Site versus national average



Site versus Podregion average



4 Median market rent (municipality)

Median market rents in Zakopane (2025)

Equipment class	Rent ¹	Average ²	Deviation ³	Standard dev. ⁴
Storage areas A	3.60 €	2.85 €	+26.3 %	±8.3 %
Storage areas B	3.05 €	2.35 €	+29.8 %	±9.3 %
Storage areas C	2.30 €	1.60 €	+43.8 %	±10.5 %
Logistics space A	3.70 €	3.05 €	+21.3 %	±7.6 %
Logistics space B	3.15 €	2.60 €	+21.2 %	±7.7 %
Logistics space C	2.45 €	1.90 €	+28.9 %	±8.3 %
Production areas A	3.45 €	2.70 €	+27.8 %	±8.2 %
Production areas B	2.85 €	2.15 €	+32.6 %	±9.6 %
Production areas C	2.05 €	1.35 €	+51.9 %	±13.0 %
Office spaces A	6.80 €	6.45 €	+5.4 %	±3.7 %
Office spaces B	5.65 €	5.30 €	+6.6 %	±3.4 %
Office spaces C	4.60 €	4.35 €	+5.7 %	±2.9 %

5 Property yield per quality class (municipality)

Average yield in Zakopane (2025)

Equipment class	Interest rate
Yield A	7.4 %
Yield B	9.2 %
Yield C	11.2 %

Angegebene Rendite ist die Nettoanfangsrendite



6 Maintenance costs (Podregion)

Average maintenance costs in the Podregion

Type of use	2025
Storage areas A	4.48 €/m ² /Year
Storage areas B	3.58 €/m ² /Year
Storage areas C	2.55 €/m ² /Year
Logistics space A	4.48 €/m ² /Year
Logistics space B	3.58 €/m ² /Year
Logistics space C	2.55 €/m ² /Year
Production areas A	6.14 €/m ² /Year
Production areas B	4.21 €/m ² /Year
Production areas C	3.45 €/m ² /Year
Office spaces A	3.85 €/m ² /Year
Office spaces B	2.33 €/m ² /Year
Office spaces C	1.84 €/m ² /Year

7 Administrative costs (Podregion)

Average administrative costs in the Podregion

Type of use	2025
Storage areas A	1.39 €/m ² /Year
Storage areas B	1.25 €/m ² /Year
Storage areas C	0.90 €/m ² /Year
Logistics space A	1.39 €/m ² /Year
Logistics space B	1.30 €/m ² /Year
Logistics space C	0.90 €/m ² /Year
Production areas A	1.75 €/m ² /Year
Production areas B	1.70 €/m ² /Year
Production areas C	1.52 €/m ² /Year
Office spaces A	1.34 €/m ² /Year
Office spaces B	0.94 €/m ² /Year
Office spaces C	0.85 €/m ² /Year



8 Sources

Statistical data: Statistical Offices; Europe-wide, cross-border distance model based on independent research
 Market rents: Own Research
 Property rates: Own Research

9 Definitions

EU-Heatmap

Our heatmap for industrial real estate leverages a comprehensive evaluation model that incorporates a cross-border distance model and various socio-economic indicators. AAA-rated locations represent the most optimal sites that fulfill the highest criteria. Locations with characteristics similar to these top-tier AAA sites are classified into categories ranging from AA to C based on their comparability, with AA nearly matching the ideal conditions and C indicating the least suitable locations. This structured approach facilitates a precise evaluation of site suitability for industrial real estate both within individual countries and across multiple countries.

Classification of Hall- and office areas

Warehouses are primarily used for the storage of goods. They often have a low ceiling height and have only a limited number of ground level gates or ramps.

	Equipment class A	Equipment class B	Equipment class C
Age of building	below 10 years	10 to 25 years	25 years and older
Hall height	8.5m or higher	6.0m until 6.8m	below 6.0m
Hall floor bearing capacity	minimum 5t/sqm	4.0t/sqm to 5t/sqm	below 4.0t/sqm
Gates	minimum 1 gate per 1,000sqm hall area	minimum 1 gate per 2,500sqm hall area	less than 1 gate per 2,500sqm hall area
Service area/switching area for trucks	broad	adequate	insufficient
Heating system	efficient	adequate	no heating system
Illumination through daylight	Daylight through light domes and window bands	Daylight through light domes or window bands	insufficient



Logistic halls combine storage and distribution functions. They have a higher hall height and depth and a higher number of ramp gates than conventional warehouses. Logistics halls are usually heated and equipped with a sprinkler system.

	Equipment class A	Equipment class B	Equipment class C
Age of building	below 10 years	10 to 25 years	25 years and older
Hall height	10.5m or higher	7.0m until 10.5m	below 7.0m
Hall floor bearing capacity	minimum 5t/sqm	4.0t/sqm to 5t/sqm	below 4.0t/sqm
Gates	minimum 1 ramp gate per 1,500sqm hall area plus ground level gates	minimum 1 ramp gate per 2,500sqm hall area	less than 1 ramp gate per 2,500sqm hall area
Service area/switching area for trucks	broad	adequate	insufficient
Heating system	efficient	adequate	no heating system
Illumination through daylight	Daylight through light domes and window bands	Daylight through light domes or window bands	insufficient

Production halls primarily serve the production of goods. They are mostly heated and have walk-in roller doors, daylight and partly crane systems.

	Equipment class A	Equipment class B	Equipment class C
Age of building	below 10 years	10 to 25 years	25 years and older
Hall height	6.5m or higher	5.5m to 6.5m	below 5.5m
Hall floor bearing capacity	minimum 5.0t/sqm	4.0t/sqm to 5.0t/sqm	below 4.0t/sqm
Gates	minimum 1 ground level gate per 1,500sqm hall area plus ramp gates	minimum 1 ground level gate per 3,000sqm hall area	less than 1 ground level gate per 3,000sqm hall area
Service area/switching area for trucks	broad	adequate	insufficient
Heating system	efficient	adequate	no heating system
Illumination through daylight	Daylight through light domes and window bands	Daylight through light domes or window bands	insufficient



The indicated rental prices of **office spaces** refer exclusively to office space in commercial and / or industrial areas, which are located directly in or on an indoor area. If you are looking for rental prices for an office space **NOT** attached to industrial properties, we would like to refer you to the [OfficeBundle](#).

	Equipment class A	Equipment class B	Equipment class C
Age of building	below 10 years	10 to 25 years	25 years and older
Ceiling height	3.0m or higher	2.5m to 3.0m	below 2.5m
Sun protection	External blinds, electrically operated	External blinds, manually operated	No sun protection
Cabling	False floor	Raised floor	Window sill duct
Cooling	Air conditioning	Cooling ceiling	No cooling
Security technology	Access control, additional video control	Access control	No security technology

Median

The median is an average for distributions in statistics. The median of a number of values is the number that is in the mid position when sorting the values by size. Generally, a median divides a sample, a number of values, or a split into two halves, such that the values in one half are smaller than the median, and larger in the other.

The median belongs to the group of quantiles and can also be considered as a 0.5-quantile. Compared to the arithmetic mean, often called average, the median is more robust against outliers (extremely differing values).

Market rent

The indicated market rent are the medians of the asking rents on the basis of the focused community. For this purpose, all offers in all major real estate portals were evaluated and then clustered according to main types of use and facility/equipment classes. Besides comparable object types and location, comparable soil values are also used. The median results from at least five comparable buildings.

The rents are shown separately according to the equipment classes modern (A), functional (B) and simple (C) as well as the main utilisation types logistics, warehouse (storage) and production, amounting to Euro per each square meter (€/sqm) for the gross floor area (BGF).

To avoid the problem of "outliers" in the data groups, no median were deliberately chosen.

The indicated rental prices for office spaces refer exclusively to office space in commercial and / or industrial areas, which are located directly in or on an indoor area.

¹Average rents for the chosen equipment class in Zakopane (GISCO PL219|PL_1001121691701) in 2025

²Average rent of chosen equipment class of all cities and municipalities in Poland in 2025 with a comparable site suitability rating as Zakopane (see section: IndustrialScore)

³Deviation of rent¹ in 2025 to the national average² of all comparable locations in 2025



Property interest rate

Property rate §21 para. 2 of the ImmoWertV (Ordinance on the Valuation of Property).

"Property interest rates are capitalization interest rates with which the market values of properties are typically interest-bearing on average, depending on the type of property. Property interest rates are determined according to the principles of the income approach as per §§ 27 to 34, based on suitable purchase prices and the corresponding net incomes."

They are to be derived on the basis of suitable purchase prices and their corresponding net income for similarly constructed and used land, taking into account the remaining useful life of the buildings in accordance with the principles of the capitalized earnings method (§§ 17 to 20).

The real estate yield is calculated using a converted earnings formula (income value method) analogous to ImmoWertV. The determination here is carried out iteratively.

The stated real estate yield is at community level. The classification A, B and C refers to an industrial property with:

- A: Building age under 10 years
- B: Building ages between 10 and 25 years
- C: Building age older than 25 years

In case of mature industrial plants, the building age per building part or the fictitious mean building age of the entire plant must be used.

NUTS levels (administrative boundaries) Sources:

- <https://ec.europa.eu/eurostat/web/nuts/overview>
- <https://ec.europa.eu/eurostat/web/nuts/correspondence-tables>

The NUTS classification (Nomenclature of territorial units for statistics) is a hierarchical system for dividing up the economic territory of the EU for the purpose of:

- the collection, development and harmonisation of European regional statistics
- socio-economic analyses of the regions
 - NUTS 1: major socio-economic regions
 - NUTS 2: basic regions for the application of regional policies
 - NUTS 3: small regions for specific diagnoses
- framing of EU regional policies
 - regions eligible for support from cohesion policy have been defined at NUTS 2 level
 - the cohesion report has so far mainly been prepared at NUTS 2 level

Administrative costs

Administrative costs are, according to §19 ImmoWertV, costs for the manpower and facilities necessary for the administration of the property as well as the legal or voluntary examination of the annual financial statement and supervision.

²Average administrative costs of chosen equipment class of all cities and municipalities in Poland in 2025 with a comparable site suitability rating as Zakopane (see section: IndustrialScore)

³Deviation of administrative costs in 2025 to the national average² of all comparable locations in 2025

Maintenance costs

Maintenance costs are costs incurred to keep the building in its intended and contractual condition. In this case, the costs of the commercial tenancy agreement can in principle be assigned to the tenant, the landlord or even partially to both contracting parties.

²Average maintenance costs of chosen equipment class of all cities and municipalities in Poland in 2025 with a comparable site suitability rating as Zakopane (see section: IndustrialScore)



³Deviation of maintenance costs in 2025 to the national average² of all comparable locations in 2025

Standard deviation

The standard deviation is defined as the square root of variance. It indicates the range of typical values in a population (ca. 68% for normal distributions) when added to/subtracted from the median. In order to give normalized information, it is expressed as a percentage of the respective average for each indicator. The farther outside the boundaries of one standard deviation a value is, the less common it is within the population.



10 Contact and Imprint

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